Contact Information in CATALYST

https://fortress.wa.gov/doh/catalyst

Menu Location: CONTRACT MANAGEMENT – CONTRACTOR – CONTACT Screen

Purpose:

- Gives users access to tobacco contacts statewide by community, school or tribe
- Enables users to search by contact type (e.g. primary, director, fiscal etc.)
- Allows users to view contacts for specific planned activities
- The list of contacts populates other dropdown menus in CATALYST (e.g. Contract-FTE & Outputs-Time Estimates)

Which reports display contact information in CATALYST?

- **Contact by Contractor**
  - Who was that very nice person I met at the meeting from the Local Health Department?
  - What is the contact information for the DOH Assessment/Evaluation staff?
- **Contact by County**
  - Who are all the important tobacco control contacts in my county?
- **Contract Summary** – displays primary contact only
  - How much money did we get in a particular year?
  - How did we distribute our funds among goals?
  - Is our workplan locked yet?
  - What significant events related to our contract have happened?
  - How can I summarize important information about our contract for an administrator?
- **Planned Activities** – displays primary contact only
  - Who is doing a particular activity with a particular group (e.g. Hispanic/Latino, etc.)?
  - What is a particular contractor doing overall?
- ***Actual Activities** – displays primary contact only
  - What have we achieved with a particular activity?
  - When did we do a particular event?
  - What is going on overall in a particular area?

Frequently Asked Questions (FAQs):

Q: When do I update my contact info?

A: Contact information should be updated as changes occur in staffing. See “How to Enter Contact Information” (p.2) for instructions on entering or updating your contacts in CATALYST.

Q: Who do we list in our contacts?

A: CATALYST can record contact information for the following types of contacts: Tobacco Program Staff, Fiscal Contact, Health Officer, Advisory Board Chair, P&I Coordinator, Support Staff, Communication Specialist, Contractor, Minority Health Specialist, School Nurse, E-Team Member, Health Educator, ETS Contact, Cessation Contact, Maternal Support Services Contact, Safe & Drug Free Coordinator. Multiple contact types can be saved for individuals

Q: Who can view my contact information?

A: All users can view contact information by generating any of the reports listed above except the Actual Activities Report.

*Actual Activities can only be viewed by the reporting agency.

How to Enter Contact Information in CATALYST

https://fortress.wa.gov/doh/catalyst

Step 1: Login to CATALYST – A successful login will open the message screen
(An unsuccessful login will give you a 'login failed' message in red)

Step 2: From the toolbar at the top of the screen
- Select **CONTRACT MANAGEMENT – CONTRACTOR**

Step 3: The **FIND CONTRACTOR** screen will appear
- Check to see if the **CONTRACTOR** field is populated with your agency (If not, use the contractor drop down menu to select your agency) &
- Click **FIND** (The new button is used by DOH to add new contractors).
- Click the contractor name line at the middle of the screen.

Step 4: The **CONTRACTOR** screen will appear
- The header indicates Contractor Name for the contract.
- The **BASICS** tab has agency specific information you can change by re-entering the new information in the text boxes.

Step 5: Click the **CONTACT** tab to change individual contact information
- If updating a current contact select the contact name from the list at the bottom of the screen. This will populate the text fields with the information for the contact you selected.
- If adding a new contact click **NEW.** This will clear information from the text fields.
- To begin select the **CONTACT TYPE** from the scroll box. If a contact has more than one type use the **CONTROL** key from the keyboard to make multiple selections. Select the first contact type and then hold the **CONTROL** key down and use the mouse to select the remaining contact types.
- Update or add address, phone, and e-mail information.
- When you are done **CLICK UPDATE**. This will update the contact information on the bottom of the screen or add a new contact to the list.
- To add another contact you must click **NEW** before proceeding otherwise you will continue to make changes on the same contact.

Step 6: Click **SAVE**
- Update is used to make updates to the information on the screen but you must click **SAVE** for the information to be saved in the system. This can be done once at the end of your updates.

Notes:
1) **Update** – this button is used to update any edits made to a contact. Changes will appear in the text line at the bottom of the screen. Click SAVE to save your updates in CATALYST.
2) **New** – this button is used to clear information from the text boxes and prepare the screen for entering a new contact. Use between entries.
3) **Save** – this button saves all of your updates in the system and returns the user to the main contractor page.